



## Mortgage Application

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### Overview

Thoroughly documenting a customer's details is critical with processes as complex as mortgage applications. This form has over 230 fields, taking the applicant through a series of questions about their financial circumstances. Data is categorised in an ordered fashion through sections of the form; such as "Address history" and "Employment and Income details".

### Additional features

**Show/hide Field Permissions:** Many of the form's fields will not be relevant for the applicant except under certain circumstances. For this reason, many of the fields remain hidden until certain conditions are met.

In the example seen here, if the applicant has selected 'yes' to a valuation, then the field '*Do you wish to arrange a more comprehensive survey*' is then allowed to appear.

The screenshot shows a configuration interface for a field named "Comprehensive survey". The field's question is "Do you wish to arrange a more comprehensive survey?". Below the question is a "Copy rights from group" section with a dropdown menu and a "Copy" button. The main part of the interface is a table with columns for different user roles: All, Applicants, Underwriters, Admin, Submitter of ticket, and Ticket handler. Each role has sub-columns for "View" and "Edit" permissions. Two condition sets are listed: "Default (Always)" and "Valuation = Yes". The "Valuation = Yes" condition set shows "Allow" permissions for Applicants, Underwriters, and Admin, and "Not set" for Submitter of ticket and Ticket handler. A "+ Add Condition Set" button is at the bottom left.

	All		Applicants		Underwriters		Admin		Submitter of ticket		Ticket handler	
Field condition set	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit	View	Edit
= Default (Always)	Mixed	Mixed	Deny	Deny	Deny	Deny	Deny	Deny	Not set	Not set	Not set	Not set
= Valuation = Yes	Mixed	Mixed	Allow	Allow	Allow	Allow	Allow	Allow	Not set	Not set	Not set	Not set

Head to the *Field Visibility* tab in the form once imported onto your site to see the full list of rules in place.

**Custom messages:** The use of phrases like 'ticket' might not suit as well as 'application', so we have used the *Custom Messages* area to change the wording whenever it appears.

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Project options

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- Edit project properties
- Project permissions
- Statuses
- Conditions
- Field condition sets
- Triggers
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- SLA

### Custom messages

Replace the default phrasing of the form with words of your choice. For example, "View Ticket" can change to "View Feedback Form" and "List of Tickets" can change to "List of Feedback Forms"

<b>List of tickets</b>	<input type="text" value="Mortgage Applications"/>
<b>Submit ticket</b>	<input type="text" value="Submit Mortgage Application"/>
<b>View ticket</b>	<input type="text" value="View Mortgage Application"/>
<b>Update issue</b>	<input type="text" value="Update application"/>
<b>Clone issue</b>	<input type="text" value="Clone application"/>
<b>Delete issue</b>	<input type="text" value="Delete application"/>
<b>Ticket submitted</b>	<input type="text" value="Application has been submitted"/>
<b>Issue has been updated</b>	<input type="text" value="Application has been updated"/>

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